

This Page Is Inserted by IFW Operations  
and is not a part of the Official Record

## **BEST AVAILABLE IMAGES**

Defective images within this document are accurate representations of the original documents submitted by the applicant.

Defects in the images may include (but are not limited to):

- BLACK BORDERS
- TEXT CUT OFF AT TOP, BOTTOM OR SIDES
- FADED TEXT
- ILLEGIBLE TEXT
- SKEWED/SLANTED IMAGES
- COLORED PHOTOS
- BLACK OR VERY BLACK AND WHITE DARK PHOTOS
- GRAY SCALE DOCUMENTS

**IMAGES ARE BEST AVAILABLE COPY.**

**As rescanning documents *will not* correct images,  
please do not report the images to the  
Image Problems Mailbox.**

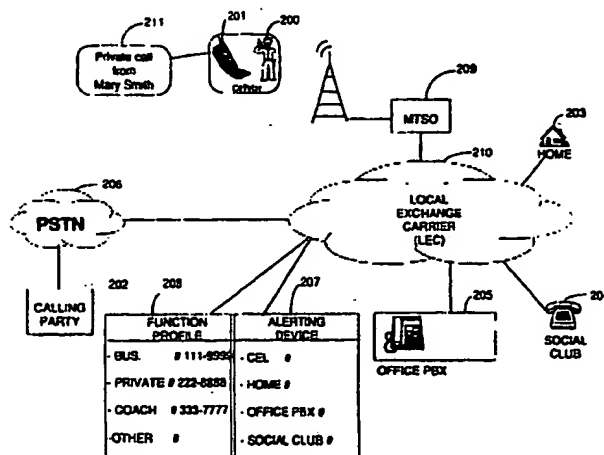
**THIS PAGE BLANK (USPTO)**



## INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(51) International Patent Classification <sup>5</sup> : <b>H04M 3/38, H04Q 3/00</b>		A1	(11) International Publication Number: <b>WO 94/29992</b>
			(43) International Publication Date: <b>22 December 1994 (22.12.94)</b>
(21) International Application Number: <b>PCT/CA94/00258</b>		(81) Designated States: CA, JP, European patent (AT, BE, CH, DE, DK, ES, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE).	
(22) International Filing Date: <b>11 May 1994 (11.05.94)</b>		Published With international search report.	
(30) Priority Data: <b>08/075,332</b> <b>11 June 1993 (11.06.93)</b> <b>US</b>			
(71) Applicant: <b>NORTHERN TELECOM LIMITED [CA/CA];</b> World Trade Center of Montreal, 8th floor, 380 St. Antoine Street West, Montreal, Quebec H2Y 3Y4 (CA).			
(72) Inventors: <b>BANNISTER, Cecil, H.;</b> 4316 Peggy Lane, Plano, TX 75074 (US). <b>MARCHETTI, F., Marco;</b> 4213 McAlice Drive, Plano, TX 75093 (US). <b>MO, Richard, C.;</b> 5311 Oak Lake Drive, Dallas, TX 75287 (US). <b>SWITZER, Tod, W.;</b> 1105 Brookview Drive, Allen, TX 75002 (US). <b>MOGHE, Dhawal, Balkrishna;</b> 3604 Tumbil Lane, Plano, TX 75023 (US).			
(74) Agent: <b>FORTIN, Jean-Pierre;</b> Northern Telecom Limited, Patent Department, P.O. Box 3511, Station "C", Ottawa, Ontario K1Y 4H7 (CA).			

## (54) Title: METHOD AND APPARATUS FOR PROVIDING USER CONTROLLED CALL MANAGEMENT SERVICES



## (57) Abstract

A personal communication feature is presented which facilitates the screening of incoming calls by associating the number dialed by a calling party with a function or role of the dialed number. This function or role is then sent to the subscriber when an incoming call is received. This way, the subscriber can decide to answer the incoming call knowing the role or context associated with the dialed number. The subscriber also provided with user controlled features which can be invoked by the use of DTMF codes. The subscriber can place a calling party on hold prior to answering the incoming call. In addition, the subscriber can proceed with a call transfer from a wireless telephone to a wired telephone and vice-versa, while the call is still in progress. Another feature allows the subscriber to implement a real-time call screening, while the calling party is leaving a message on voice mail. Yet another feature provides a wide area virtual extension to several subscribers such that an incoming call will be simultaneously routed to each subscriber in the group, as if their telephones were extensions of each other.

**FOR THE PURPOSES OF INFORMATION ONLY**

Codes used to identify States party to the PCT on the front pages of pamphlets publishing international applications under the PCT.

AT	Austria	GB	United Kingdom	MR	Mauritania
AU	Australia	GE	Georgia	MW	Malawi
BB	Barbados	GN	Guinea	NE	Niger
BE	Belgium	GR	Greece	NL	Netherlands
BF	Burkina Faso	HU	Hungary	NO	Norway
BG	Bulgaria	IE	Ireland	NZ	New Zealand
BJ	Benin	IT	Italy	PL	Poland
BR	Brazil	JP	Japan	PT	Portugal
BY	Belarus	KE	Kenya	RO	Romania
CA	Canada	KG	Kyrgyzstan	RU	Russian Federation
CF	Central African Republic	KP	Democratic People's Republic of Korea	SD	Sudan
CG	Congo	KR	Republic of Korea	SE	Sweden
CH	Switzerland	KZ	Kazakhstan	SI	Slovenia
CI	Côte d'Ivoire	LI	Liechtenstein	SK	Slovakia
CM	Cameroon	LK	Sri Lanka	SN	Senegal
CN	China	LU	Luxembourg	TD	Chad
CS	Czechoslovakia	LV	Latvia	TG	Togo
CZ	Czech Republic	MC	Monaco	TJ	Tajikistan
DE	Germany	MD	Republic of Moldova	TT	Trinidad and Tobago
DK	Denmark	MG	Madagascar	UA	Ukraine
ES	Spain	ML	Mali	US	United States of America
FI	Finland	MN	Mongolia	UZ	Uzbekistan
FR	France			VN	Viet Nam
GA	Gabon				

**METHOD AND APPARATUS FOR PROVIDING USER CONTROLLED  
CALL MANAGEMENT SERVICES**

**Field of the Invention**

5           This invention relates to personal communication services (PCS), but more particularly, to a system and method for providing the service subscribers with more flexibility in handling incoming calls.

10   **Background of the Invention**

          New telephone features have recently been introduced to provide telephone subscribers with enhanced personal communication services. These features are designed to make it easier for a calling party to reach the  
15   subscriber. For example, in one instance, a single personal telephone number is provided to a customer of the service. This personal telephone number is associated with a customer profile which is designed to assist in the routing of an incoming call, regardless of their physical  
20   location. In a typical scenario, a caller can attempt to reach the subscriber by dialing the personal telephone number that has been assigned to that subscriber. A call connection will be attempted according to the subscriber's profile. The subscriber's profile is used to route the  
25   call according to where the subscriber is expected to be at that time and day, that is, at the subscriber's home, office, automobile if the subscriber has a cellular telephone or simply to a voice messaging system.

          The problem with these new services, is that in  
30   making the subscriber more reachable, the implementation of call management services have become much more difficult. Also, since practically anyone can reach the subscriber regardless of his location, the subscriber has to rely on the service to screen incoming calls. Any changes to the  
35   subscriber weekly schedule will have to be entered in the system, either by the subscriber or by a service provider's operator. Also, regular calls routed directly to the

subscribers home, office or cellular telephone will not be screened by the service.

Accordingly, there is a need for personal communication services wherein call screening is facilitated by associating the number dialed by a calling party with a function or role of the dialed number. That is, a private role for calls directed to a home or cottage number, a business role for calls directed to the office, a social role for calls directed to the baseball or country club, etc. This function or role is then sent to the subscriber when an incoming call is received. In addition, the calling party CLID and/or name will also be sent to the subscriber. In this way, the subscriber can decide to answer the incoming call knowing the role or context associated with the dialed number.

Similarly, another form of telephony that has seen tremendous growth is in the area of wireless telephony. Unfortunately, portable telephone users, regardless of whether they are using cellular or low power wireless type telephones, have very few services available to them for screening incoming calls. For example, although an incoming call will in most instances reach the portable phone user, the user's call management options will normally be limited to a) answering the call or b) have the call sent to voice mail.

Accordingly, there is a need for personal communication services which other than providing enhanced reachability for the subscriber, will give a cellular or portable telephone user additional services in handling and screening incoming calls.

#### Summary of the Invention

According to the system and method of the present invention, various levels of personal communication services can be provided without the problems associated with the existing PCS services. In particular, a service node is used by the service provider, such as a Local

Exchange Carrier (LEC) to provide the subscriber with the ability to screen incoming calls based on the role or function associated with the numbers dialed by a calling party. A mobility service node provides the LEC with the intelligence required to service incoming calls to subscribers.

Thus, in accordance with a first feature of the present invention, a service provider can provide call screening to subscribers based on the role or function associated numbers. With this feature, a subscriber receives not only the calling number ID and/or name of the calling party, but also the function or role associated with the number dialed by the calling party. For example, when a calling party is dialing the subscriber's home or cottage telephone number, the call will be associated with a private role. A call to the business number will be associated with a Business role. Therefore, call screening can be enhanced by having the role associated with the number dialed sent to the subscriber along with the CLID and/or name of the calling party. Thus, upon receiving the call, the subscriber can determine from the display the associated role of the called number and decide how to handle the incoming call.

In accordance with another feature of the present invention, a subscriber having a portable terminal can invoke a call-on-hold feature when an incoming call is received, if he or she is unable to immediately answer the call. This would be the case when the subscriber is unable to talk privately, is in a noisy environment or can be disruptive to others, such as in meetings, elevators, cafeteria, bus stop, etc. This feature would be activated while the subscriber's terminal is ringing by pressing a terminal function key, such as \*2. A message would then be offered to the calling party prompting him or her to "please wait and the call will be answered shortly". In the mean time, the subscriber can move to a more convenient location or more suitable environment to answer the call.

The subscriber can then get connected to the incoming call by dialing another terminal function key, such as \*1 on the telephone keypad.

In accordance with another feature of the present invention, a subscriber can invoke an Access Independent Hand-off feature which allows a subscriber to transfer a call from a wireless terminal to a wireline set and vice-versa while remaining connected to the calling party.

In accordance with another feature of the present invention, a service provider can offer a Wide Area Virtual Extension (WAVE) feature to a group of subscribers wherein calls directed to say, a PRIVATE telephone (e.g.. home) number, will be routed to alerting devices of multiple subscribers in the group (e.g.. husband and wife). Those responding to the incoming call will then be conferenced in to the call, as if each telephone were extensions of each other.

In accordance with another feature of the present invention, a subscriber can invoke a real-time call screening feature wherein an incoming call is routed to Voice Mail. While the calling party is recording a message on Voice Mail, the subscriber can listen in real-time to the calling party's voice. If the subscriber recognizes the calling party or the message content, the subscriber can make a connection with the calling party by pressing the required key (e.g.. \*2), and at the same time exiting voice mail. The voice mail system does not retain any such interrupted messages.

Accordingly, it is an aspect of the present invention to provide a method of providing improved call screening to subscribers of personal communication services, comprising the steps of:

- assigning a role to a network address provided to a subscriber of said personal communication services;
- storing a list of all network addresses and corresponding roles in a subscriber database;
- assigning a separate network address corresponding



to a call alerting device used by said subscriber to receive incoming calls;

storing said separate network address in said subscriber's database;

5       accessing said subscriber database when a call from a calling party is directed to one of said network address on said list;

identifying the role assigned to the network address to which the call is directed;

10       routing the identified role to said separate network address associated with said subscriber's call alerting device; and

establishing a voice path from said calling party to said subscriber's call alerting device when going off-  
15 hook.

In accordance with another aspect of the present invention there is provided a method of providing improved call screening to subscribers of personal communication services, comprising the steps of:

20       routing incoming calls directed to any one of a number of network addresses provided to a subscriber, to a call alerting device used by the subscriber to receive incoming calls, wherein a role associated to each network address is routed to said subscriber call alerting device  
25 before the incoming call is answered, such that call screening is improved.

In accordance with yet another aspect of the present invention there is provided a method of providing user controlled personal communication services (PCS) for  
30 users of call alerting devices, wherein specified communication services can be invoked by the user prior to answering a call from a calling party, comprising the steps of:

storing, in a service node database, a list of  
35 network addresses at least one of which is assigned to a PCS subscriber;

storing for each subscriber listed in said

database, a separate network address associated with the subscriber's alerting device;

storing for each subscriber listed in said database, a list of DTMF codes and associated services that  
5 a subscriber can invoke when an incoming call is received;

accessing said database when an incoming call to one of said network addresses on said list is received at said service node, to determine where the call should be routed;

10 determining the call alerting device and associated separate network address of the called subscriber;

establishing a voice path between the alerting device and the calling party if the subscriber goes off-hook;

15 accessing said list of DTMF codes in said database if a DTMF code is received from said subscriber, to determine the requested communication service; and enabling the selected service.

In accordance with yet another aspect of the  
20 present invention there is provided a method of providing user controlled call transfer from a first call alerting device to a second call alerting device while a call is in progress between a PCS subscriber and a calling party, comprising the steps of:

25 establishing a link from said second alerting device to a service node connected to a host switch, said host switch providing a voice path between said calling party and said subscriber using said first call alerting device;

30 sending a DTMF code from said second alerting device to said service node, said DTMF code corresponding to a request for a call in progress transfer;

instructing said host switch to establish a conference bridge such that a second voice path is  
35 established between said second alerting device and said calling party; and

releasing said first voice path, such that said

call can continue between said calling party and said subscriber on said second alerting device.

#### **Brief Description of the Drawings**

- 5           Figure 1a is a block diagram illustrating the interaction of a mobility service node with a Local Exchange Carrier and the Public Switched Telephone Network;
- Figure 1b is a block diagram of one embodiment of the mobility service node for providing the PCS services of
- 10   the present invention;
- Figure 2a shows a typical call scenario using the Role or Function Associated Number feature;
- Figure 2b illustrates a call scenario using the call-on-hold feature;
- 15           Figure 2c illustrates the Access Independent Handoff call scenario;
- Figure 2d shows the Wide Area Virtual Extension (WAVE) call feature scenario; and
- Figure 2e shows a user-controlled real-time call
- 20   screening scenario according to another PCS feature of the present invention.

#### **Description of the Preferred Embodiment**

- As is shown in Figure 1a, a service node 10 for
- 25   providing PCS services is connected to a host switch 11 at the Local Exchange Carrier (LEC) 12. The host switch 11 is also connected to the Public Switched Telephone Network (PSTN) 13. The host switch 11 can, for example, be
- comprised of a central office switch, such as a DMS-100
- 30   (Trademark) digital telephone switch, or a Private Branch Exchange, such as an SL-1(Trademark), both available from Northern Telecom. When a caller 14 dials anyone of the PCS subscriber's role numbers (e.g. home, business, etc.), the PSTN will direct the call to the LEC associated with the
- 35   digits dialed. At LEC 12, the call is intercepted by the host switch 11 to determine whether the called subscriber has access to the PCS service. This will be determined by

comparing the dialed number with subscriber telephone numbers in a database at service node 10. If the dialed number corresponds to one of the numbers in the PCS subscriber's list, then from this point on, the service  
5 node 10 will interact with the host switch 11 to attempt call completion to the subscriber's alerting devices, according to the subscriber's profile contained at the service node 10. The alerting device can be, but is not limited to, the subscriber's pager, subscriber's portable  
10 telephone, home line, business line, etc. The subscriber can select anyone of the alerting devices listed, by accessing the service node. A description of the interaction between the service node and a subscriber is described in a co-pending application having serial number  
15 887,758. In Figure 1a, the subscriber could select the cellular telephone 17 as the alerting device when outside of the business location 15 and a portable low power wireless type telephone when inside the business location. As will be shown further, the service node enables the LEC  
20 to provide PCS services from the most basic call-on-hold to the more advanced call origination/delivery using role or function associated numbers.

As shown in Figure 1b, the service node 10 interacts with the host switch 11 and voice mail 21, by  
25 making use of an application processor 22 for accessing service profiles 24 of one or more subscribers. These components are currently available from Northern Telecom, as Meridian Mail Voice Processor (MMVP), and dual processor Meridian Application Equipment Module (AEM). Meridian is a  
30 Registered Trademark of Northern Telecom.

Network connectivity and switching functions can be carried out by a voice switch (not shown), or the host switch 11. The service node 10 is connected to host switch 11 and the PSTN network 13 via an ISDN Primary Rate Access  
35 (PRA) link 23, or an equivalent link able to carry voice and signaling information. Call information includes the original dialed number, calling line identification, call

redirection information, called number, etc.

The Recording Announcement (RAN) module 19 can either be part of a Meridian Voice Mail system or connected directly to the host switch 11 as a RAN module via a T1 link and a universal trunk module line card. The RAN module is available from Northern Telecom. The RAN module 19 provides voice prompts to a calling party when the service node is interfacing with the caller. For example, a typical voice prompt would be "Please hold while we try to connect you to --John Doe--."

The application processor 22 makes use of databases 24 which contain the service profiles of the PCS subscribers, for providing the subscriber with communication mobility and incoming call management. Database 24, can either form an integral part of the application processor 22, or be part of a separate storage facility.

One of the files making up the subscriber's profile is the voice messaging file 25. This file contains information about the subscriber's voice messaging service, such as what types of message will be played, access codes required for accessing voice mail from a remote location, etc.

Another file which makes up the subscriber's profile and which stores information about the subscriber's alerting device(s) is the alerting device file 26. This file contains the type of alerting device, e.g. pager, portable (low power wireless) type terminals or cellular telephone. The Directory Numbers DN associated with each device would be stored on this file. An example of a typical Alerting Devices List is shown below in Table 1.0

TABLE 1.0

DEVICE		NUMBER
CELLULAR TELEPHONE		444-1212
5	PORTABLE LOW POWER WIRELESS TELEPHONE	444-1313
OTHER DEVICES		NUMBER
PAGER:		551-1155
TYPE:		DIGITAL
10	MESSAGE SYSTEM:	922-2222
MAILBOX NUMBER:		1234
MAILBOX PASSWORD:		555
MWI COORDINATION:		YES
OPERATOR:		333-4567

15

In TABLE 1.0, "Numbers" show the Directory Numbers (DN) associated with each alerting device, whereas "Device" show the type of alerting device selected by the subscriber for receiving incoming calls.

20

"Other Devices" include the possible destinations for completing calls when a subscriber can't be reached. These can be a pager, a messaging system, or a private operator. Sufficient information is provided to allow PCS to complete the call to these destinations.

25

Referring again to Figure 1b, another file which also makes up the subscriber's profile is the Subscriber Number & Function List 27. This list contains the network addresses and types of telephones used by the subscriber and the usual role or function associated with those

30

telephones. An example of a Subscriber Number & Function List is shown below in TABLE 2.0.

TABLE 2.0

	ROLE	NUMBER	LOCATION
	PERSONAL	123-1234	HOME
5		777-1234	COTTAGE
	BUSINESS	555-1234	OFFICE
	SOCIAL	666-1234	YACHT CLUB

"ROLE" define the social roles associated with the  
10 subscriber. For example, the subscriber will have a  
private role associated with home and the cottage, a  
business role at the office, and a social role at the  
baseball or yacht club.

"Number" is the network address of the telephone  
15 device associated with that role. Under a basic PCS  
service of the present invention, if a call is directed to  
anyone of these numbers it will be routed to the  
subscriber's selected alerting device with the role  
associated with the number dialed, the CLID and/or name of  
20 the calling party displayed on that device. The subscriber  
can then answer the incoming call according to the role  
associated with the called number. If a display is not  
available, a text-to-speech application can be used to  
verbalize the information which would normally be shown.

25 Also part of the subscriber's profile is the  
Subscriber's Services & PAN List 28. This list indicates  
the type of services the subscriber can invoke, keys  
required to activate the service and the subscriber's  
Personal Access Number (PAN) required to complete a  
30 connection when certain types of services are invoked (e.g.  
call-on-hold, access-independent-handoff, etc.) An example  
of a Subscriber Services list is shown in TABLE 3.0.

TABLE 3.0

	SUBSCRIBER	SERVICE	KEY	PAN
	ALICE	- CONNECT	*1	12345
5		- HOLD	*2	
		- REAL TIME CALL		
		SCREENING	*3	
		- ACCESS INDEPENDENT		
		HANDOFF	*4	

10           Also part of the subscriber's profile are other  
Data files which store other subscriber information  
necessary to operate PCS or provide the subscriber with  
prompt and courteous operator service. An example of this  
data is shown below in TABLE 4.0.

15

TABLE 4.0

	NAME:	SUBSCRIBER NAME
	PASSWORD:	1234
20	MESSAGING PASSWORD:	9876
	CALLING CARD #:	416 555-1212 XXXX
	LANGUAGE:	ENGLISH
	ALLOWED FEATURES:	PAGER, SYSTEM
	OPERATOR	REVERT, URGENCY
25	CALL URGENCY QUERY:	PRIORITY
	ROTARY DEFAULT:	NORMAL
	NOTES: CUSTOMER IS HARD OF HEARING - SPEAK SLOWLY AND CAREFULLY WHEN GIVING ASSISTANCE	

30

"Name" and "Notes" are examples of textual comment  
fields which can be associated with the subscriber profile  
to facilitate service.

35           "Password" is the identification number for the  
subscriber, which can be used for operator verification of  
subscriber identity, or when the subscriber is calling the  
Subscriber Service Interface.



"Calling Card #" is used to charge PCS placed calls when the subscriber has directed calls to a location not local to the host switch 11.

"Language" is the language to be used for the  
5 playing prompts to Subscriber's callers.

"Allowed Features" indicates which features this subscriber has access to. The options listed in Table 4.0 are for example only, and may vary according to what is specified by the PCS service provider.

10 "Call Urgency Query" can be "none", "priority", or "emergency". If "none", calls which are not assigned an urgency in the caller list will always be assumed "normal".

If a Numeric/Digital pager is used as an alerting device by the PCS subscriber, the pager receives and  
15 displays an alpha numeric message associated with the incoming call. The PCS service node can provide the pager with the CLID and name of the caller and the role associated with the called number, if this information is known.

20 The service node 10 together with the host switch 11 and RAN module 19 are adapted to receive/send voice and signaling information there between. The host switch 11 is adapted to initiate, establish and transfer calls and generate DTMF signalling to external devices. The external  
25 devices can be a pager, or external voice messaging system. As indicated above, the RAN module 19 stores various prompts which are sent to the calling party or the subscriber, when either is communicating with the system. The RAN module 19 sends this information along a voice  
30 channel (not shown) once established. These prompts are usually the ones provided by the service provider, such as "Please hold while we try to connect you to --John Doe--". The voice mail unit 21 is used for the recording and  
35 playback of the voice of an incoming caller, when the caller is asked to leave a message, or of the subscriber, when the subscriber wants to modify the welcoming message of his or her voice mail.

The host switch 11 is also able to detect and recognize DTMF tones sent by the calling party or subscriber, when either is connected to service node 10. Similarly, the host switch can detect call progress tones which allow the system to detect busy, fast busy, re-order, ringing, etc., when the service node instructs the host switch to place a call. The Calling Line Identification (CLID), called number, incoming calls, end of call, reason for call forwarding, answer supervision, etc. are also all detected by the host switch 11. The type of information received will of course be dependent on the connection technology used.

The following description of Figures 2a-2d is directed at describing the flow of information during a call scenario for the features of the present invention. The precise interface that a caller has with the PCS service node will depend on the subscriber's requirements and the specific PCS features in use for the subscriber. In some cases, it is possible that the caller will not have any obvious interaction with the PCS service node, and in others, will respond to Call Queries and be provided with status information. The caller can make use of single-digit DTMF commands to interface with the subscriber's PCS service node. Similarly, a subscriber can also modify its PCS profile using DTMF commands. These can, for example, be:

- enter PIN (e.g. used by subscriber to the profile);
- operator assistance request (zero key);
- skip over welcome message (# key);
- skip directly to messaging (numeral 6 key); and
- subscriber's service activation keys (\*key)

Additionally, callers may be requested to make a Call Completion or Call Urgency determination via DTMF signals. The PIN can be 4 to 7 digit numbers depending on the network providing the PCS service.

**Call delivery using a role or function  
associated number**

Referring now to figure 2a, we have illustrated a typical call scenario using the call delivery feature of the present invention. In this example, the subscriber 200 is making use of a cellular telephone 201 as an alerting device. In attempting to reach the subscriber, calling party 202 can dial anyone of the subscriber's telephone numbers associated with the subscriber's private role 203, social role 204 or business role 205. As an example, not knowing where the subscriber 200 is located, a friend will dial the subscriber's private number 222-8888. The call will be routed from the calling party 202 via the Public Switched Telephone Network (PSTN) 206 to the Local Exchange Carrier (LEC) 210. At the LEC (see figure 1a & 1b), the host switch 11 will query the service node 10 and the subscriber database 24 to determine how the incoming call will be routed. For a non-PCS subscriber, the call would simply be routed to the home telephone 203. On the other hand, with a PCS subscriber, once the call is received at the host switch and is identified as being to a PCS subscriber, the service node 10 will take control of the call such that it is routed to the alerting device identified by the service profile of the subscriber. Thus, at the service node 10, the subscriber database 24 and more specifically the subscriber number and function list database 27 will identify that the dialed number is the network address to be associated with the PRIVATE role of subscriber 200. It will also identify that the subscriber has selected the cellular telephone as an alerting device. A combination of the alerting device database 26 and subscriber number and function database 27 is shown in figure 2a at reference numeral 207 and 208, respectively. The network address stored in the database corresponds to a role that the subscriber as assigned to it. The number also corresponds to the digits dialed by the calling party when making a call to the subscriber. However, it is to be

noted, that the telephone device used at the subscriber's home 203, social club 204 or office 205, may actually have a different network address. The network addresses of these devices could be unlisted, such that any call  
5 directed to those devices originates or is routed via the service node only. The subscriber would only need to provide the telephone numbers associated with a selected role. For example, he would provide the 111-9999 number to business clients and associates, the 222-8888 number to  
10 family and friends, and as a coach, would provide the 333-7777 number to, say, the players on the little league baseball team.

In operation, the host switch 11 will send a ring back signal to calling party 202 and initiate a call to the  
15 PCS subscriber at the directory number of the selected alerting device, which is, in this case the cellular telephone 201. In addition, host switch 11 will send to the subscriber's alerting device 201, the role associated with the directory number dialed by the calling party along  
20 with the CLID and/or name of the calling party. This would of course be routed via the MTSO 209. Although the mobile telephone switching office (MTSO) 209 is shown located at the LEC 210, it could also be located anywhere on the PSTN 206. Upon receiving the call, the subscriber's alerting  
25 device 201 will display (if so equipped) the CLID or name of the calling party along with the role associated with the number dialed, i.e. PRIVATE. The subscriber can therefore answer knowing that this call is directed to his private role, rather than if it was a call associated with  
30 his business or social roles. The display presented to the called party may look like the one shown at reference numeral 211. Of course, if the LCD display of the telephone used as the alerting device can only show one line, the display could be made to scroll. In instances  
35 where the subscriber does not have a suitable LCD display or no displays, voice prompts would be used to verbalize the information shown. In this case, the recording

announcement module 19, shown in figure 1a, could be used by the subscriber to initially, record such messages as "this is a PRIVATE call from", "this is a BUSINESS call from", etc. Of course, the message could also be a  
5 standard prerecorded voice message from the PCS service provider. Similarly, the calling party could either be asked to state his or her name when the call reaches the service node or could be an audio (synthesized) voice automatically converted from the CLID data. Thus, the  
10 subscriber would hear the voice recording/playback unit 44 play "this is a PRIVATE call from" "Mary Smith". This information would be transmitted over the ringing signal, as in the case of CLID.

As indicated above, the subscriber can select any  
15 one of a number of alerting devices, including his or her home telephone. In this case, if the subscriber is at home 203, the network address of the roles would not change. However, instead of having calls routed to the cellular telephone 201, the service node would route incoming calls  
20 to a separate network address associated with the telephone device used at the subscriber's home 203.

#### Call-on-hold feature

25 Referring now to figure 2b, we have shown a call scenario for the call-on-hold feature of the present invention. In its most basic form, the feature can be provided to a subscriber, without the use of CLID information of the calling party or the associated role of  
30 the called number. Thus, upon receiving an incoming call, the subscriber can instruct the service node via DTMF or signaling to offer a recorded announcement (RAN) to the caller, prompting it to wait. For example, if the subscriber is unable to answer the call at the time his  
35 alerting device is activated, but would still like to get connected, a terminal function key or combination thereof could be used, say \*2, while the terminal is ringing or

shortly after going off-hook to get connected to the service node. Upon receiving the DTMF tones, the service node will play the RAN message "please hold while your call is connected" to the calling party. In the mean time, the  
5 subscriber can move to a more suitable environment, dial the required DTMF connect code, say \*1 and get connected to the calling party.

The subscriber can also make use, if available, of the call delivery using role or function associated numbers  
10 before activating the call-on-hold feature. In the call scenario of figure 2b, calling party 200 is attempting to reach the subscriber 201 who is located in a conference room 202 near the subscriber's office 203. The calling party 200 calls subscriber 201 in his BUSINESS role and  
15 thus dials his business telephone number. The PSTN 204 routes the call to the LEC associated with the dialed digits, i.e. LEC 205. At the LEC, the call is intercepted by the service node 10 (see Figure 1b) and is determined to be directed to PCS subscriber 201. PCS subscriber 201 is  
20 making use of a cellular telephone 206 has the alerting device. Thus, the service node will instruct the host switch 11 to dial the subscriber's cellular number. The CLID & role will be routed from the LEC to the MTSO 208 which will page the subscriber on his cellular telephone  
25 206. On his cellular telephone display, the subscriber will be able to identify that the incoming call has been associated with a Business role and will also identify who the caller is. In this example, the subscriber determines that the call is important enough to be answered. However,  
30 because the subscriber is in a meeting in conference room 202, he makes the decision to answer the call outside of conference room 202. On his cellular key pad, the subscriber enters \* 2. These digits are sent back from the cellular telephone 206 to the MTSO 208 and the service node  
35 10 of LEC 205. At the service node, database 28 is read to determine what service is invoked for that subscriber when the keys \*2 are pressed (see TABLE 3.0). For this

subscriber, a call-on-hold service is provided. Thus, the service node 10 instructs the RAN 19 to send a recorded announcement to the calling party. The message could be "Please wait while we connect your call". While the  
5 calling party is on hold, the subscriber leaves the conference room 202. At this point, the subscriber has the option of answering the call outside the conference room on his cellular telephone 206 or walk over to his office telephone 207 to answer the call. If the call is answered  
10 on the cellular telephone, the subscriber presses \*1 on the cellular telephone. If the call is answered from his desk telephone, the subscriber enters his Personal Access Number (PAN) from his office telephone, upon which the service node instructs the host switch to connect the subscriber to  
15 the calling party who was placed on hold.

In the above example, the subscriber 201 is making use of the telephone's display to determine who called and in what role, prior to making his decision to answer the call. As indicated above, in its most basic form, the call-  
20 on-hold service could be provided to a subscriber, without the use of CLID and role or function associated numbers delivered to the subscriber's telephone display. In this case, the subscriber would receive the incoming call and could invoke the call-on-hold feature, but would not be  
25 able to know who is calling and in what role.

#### **Access-Independent-Handoff**

In the call scenario of figure 2c, the subscriber can make  
30 use of an Access-Independent-Handoff feature. This feature is most useful when the subscriber 301 is already connected via his cellular telephone to the calling party 300, but would like to make use of his office telephone 307 without having to place the calling party on hold. For example,  
35 when on an active call on his cellular telephone, the subscriber may want to save airtime useage by using his desk phone. Similarly, the subscriber may initially have

answered the incoming call from his desk telephone 307 but is required to leave his office while maintaining the call connection with the calling party.

When subscriber 301 wishes to transfer the current call  
5 from his cellular telephone 306 to his desk telephone 307, the subscriber goes off-hook on the office telephone 307 and dials his Personal Access Number. By going off-hook, a line is secured from the office PBX 310 to the host switch 11 of the LEC 305 (shown in Figure 1a). When the  
10 subscriber dials the PAN digits, the LEC accesses the service node 10 and identifies that the dialed PAN digits are associated with subscriber #1. The service node 10 then instructs the host switch 11 to make a connection to the current call by means of a conference bridge at the host  
15 switch 11. When a connection has been made at the desk telephone, the subscriber can press the END key on the cellular telephone keypad to hang-up and continue his conversation from the office telephone 307.

As indicated above, the handoff feature can also be  
20 initiated from the desk telephone 307 to transfer the call to the cellular telephone 306 by proceeding with the above steps by dialing the PAN from the cellular telephone.

#### Wide-Area-Virtual-Extension

25

In the call scenario of Figure 2d, subscribers 401 and 402 are making use of a Wide-Area-Virtual-Extension (WAVE) service to answer incoming calls. With this feature, incoming calls can be answered simultaneously at  
30 any telephone in the network identified by the subscribers as if the telephones were extensions to a single number. In the call scenario of Figure 2d, WAVE party #1 and WAVE party # 2 are using cellular alerting devices 403 and 404, respectively. Each alerting device would still function  
35 independently, able to send and receive calls as usual. Also, in the context of the role or function associated numbers, each subscriber can have a different BUSINESS role



number. However, in the present example, both subscribers share a common WAVE PERSONAL number associated with home, i.e. both share the same residence 405. Similarly, in another scenario, two salesman could share a common WAVE BUSINESS number, associated with their sales office.

In operation, when calling party 400 dials, say, the PERSONAL number of WAVE subscribers #1 and #2, the call is intercepted by the host switch 11 of LEC 405 and the event is reported to the service node 10. Using the subscriber number and function profile database 27, the call will be identified as being directed to one or more WAVE subscribers. The subscriber service database 28 will identify that WAVE party #1 and WAVE party #2 are to be alerted of the incoming call. The service node can then scan the alerting device database 26 for the subscriber's associated alerting devices and directory numbers. In this case, cellular telephones 403 and 404. Each number is then dialed by the host switch 11 under the control of the service node 10 and routed to the MTSO to attempt to reach subscriber 401 and 402. Each subscriber, upon answering the call, is connected to the calling party as if they were extensions at home. If subscriber 401 answers the call before subscriber 402, the alerting device 404 of subscriber 402 can be made to ring longer to allow additional time for the second WAVE party to answer the call. Similarly, the ringing tone of the second alerting device could be made to ring differently once one of the WAVE party has answered the call. With the present embodiment, the subscribers can identify from their telephone displays, the name and CLID of the calling party, as well as the role associated with the called number, i.e. WAVE PRIVATE. This allow the subscribers to decide whether one or both party should answer the call. This service could of course be provided without calling and called number identification.

A more advanced embodiment of this feature would provide the WAVE parties with the name and/or CLID of the

first associate WAVE party to answer the incoming call. For example, this could be useful when multiple members of the household are provided with the WAVE service. Once one of the WAVE party has answered the call, other members can  
5 identify who has answered and decide whether or not to conference in the call by answering the call. If they wish to conference in, after a predetermined lapse of time, they would dial in their PAN to get connected as well.

### 10                    **User-Controlled-Call-Screening**

Referring now to Figure 2e, we have shown a block diagram illustrating the user-controlled-call-screening feature of the present invention. In this example, calling  
15 party 500 is attempting to reach the PCS subscriber at his office telephone 502. When the call is received at the host node 11, access is made to service node 10 to verify if the call is directed to a PCS subscriber, as explained above. The service node then dials the alerting device of  
20 the subscriber 501. If the subscriber does not have access to the caller's name and number (CNID or CLID) service or call delivery using role or function associated numbers, the subscriber will be unable to screen the incoming call. However, with the service described herein, the subscriber  
25 501, can instruct the service node 10, say by pressing \*3 upon being alerted of an incoming call, to provide call screening. When this service is activated, the service node instructs the host switch 11 to enable the voice mail  
30 calling party 500 to leave a message for the subscriber. At the same time the connection between the subscriber cellular telephone 501 and the host switch 11 is connected to the incoming call in such a way that the subscriber can listen in (one way only) while the calling party is in the  
35 process of recording a message on the voice mail unit 21 (see Figure 1a). The host switch 11 connects the subscriber's cellular telephone 501 to the active call of

the voice mail using a one-way voice path connection. If the subscriber recognizes the calling party or if the content of the message is important, the subscriber can connect to the calling party by pressing \*1 instructing  
5 the service node that a connection is to be made with the calling party. The service node upon receiving the \*1 command will instruct the host switch 11 to provide a 2-way voice path between the calling party 500 and cellular telephone 501 and will drop the voice mail connection, thus  
10 connecting both parties. A similar call screening service is disclosed in co-pending patent application Serial No. 07/993,284 filed December 18, 1992.

## WHAT IS CLAIMED IS:

1. A method of providing improved call screening to subscribers of personal communication services,  
5 comprising the steps of:  
    assigning a role to a network address provided to a subscriber of said personal communication services;  
    storing a list of all network addresses and corresponding roles in a subscriber database;  
10      assigning a separate network address corresponding to a call alerting device used by said subscriber to receive incoming calls;  
    storing said separate network address in said subscriber's database;  
15      accessing said subscriber database when a call from a calling party is directed to one of said network address on said list;  
    identifying the role assigned to the network address to which the call is directed;  
20      routing the identified role to said separate network address associated with said subscriber's call alerting device; and  
    establishing a voice path between said calling party and said subscriber's call alerting device when going  
25 off-hook.
2. A method as defined in claim 1, wherein said identified role is routed, for display, to said subscriber's call alerting device along with the name of  
30 the calling party.
3. A method as defined in claim 1, wherein a list of subscriber selectable call alerting devices and associated separate network addresses is stored in said  
35 subscriber's database.

4. A method as defined in claim 3, further comprising the step of:

accessing said subscriber database to determine which call alerting device has been selected by said

5 subscriber to receive incoming calls; and

determining the separate network address associated with the selected call alerting device.

5. A method as defined in claim 1, wherein said  
10 list of network addresses and roles stored in said subscriber database include a network address to be associated to a personal role, a network address to be associated to a business role and a network address to be associated to a social role.

15

6. A method of providing improved call screening to subscribers of personal communication services, comprising the steps of:

routing incoming calls directed to anyone of a  
20 number of network addresses provided to a subscriber, to a call alerting device used by the subscriber to receive incoming calls, wherein a role associated to each network address is routed to said subscriber call alerting device before the incoming call is answered, such that call  
- 25 screening is improved.

7. A method of providing user controlled personal communication services (PCS) for users of call alerting devices, wherein specified communication services can be  
30 invoked by the user prior to answering a call from a calling party, comprising the steps of:

storing, in a service node database, a list of network addresses at least one of which is assigned to a PCS subscriber;

35 storing for each subscriber listed in said database, a separate network address associated with the subscriber's alerting device;

storing for each subscriber listed in said database, a list of DTMF codes and associated services that a subscriber can invoke when an incoming call is received;

accessing said database when an incoming call to  
5 one of said network addresses on said list is received at said service node, to determine where the call should be routed;

determining the call alerting device and associated separate network address of the called subscriber;

10 establishing a voice path between the alerting device and the calling party if the subscriber goes off-hook;

accessing said list of DTMF codes in said database if a DTMF code is received from said subscriber, to  
15 determine the requested communication service; and enabling the selected service.

8. A method as defined in claim 7, wherein one of said associated service comprises a call on hold feature,  
20 wherein the calling party is placed on hold until the subscriber is able to answer the call.

9. A method as defined in claim 8, wherein said call on hold feature can be enabled when the corresponding  
25 DTMF code is received at said service node, by:

sending a recorded announcement message to the calling party to hold; and

instructing a host switch connected to said service node, to place the call on hold.

30

10. A method as defined in claim 7, wherein one of said associated service comprises real time call screening, wherein said PCS subscriber can monitor, in real-time, the recording of the calling party's message on a voice mail  
35 system.

11. A method as defined in claim 10, wherein said real time call screening feature can be enabled when the corresponding DTMF code is received at said service node, by:

- 5           sending a voice prompt to said calling party to leave a message for the subscriber;  
            instructing said host node to enable said voice mail system; and  
            establishing a one-way voice path from said voice  
10 mail system to said subscriber's call alerting device such that real time call screening can be established.

12. A method as defined in claim 7, wherein one of said communication service comprises a wide area virtual  
15 extension such that an incoming call can be simultaneously routed to a group of PCS subscribers when a call is directed to a network address on said list which is shared by each subscriber in said group.

20           13. A method of providing user controlled call transfer from a first call alerting device to a second call alerting device while a call is in progress between a PCS subscriber and a calling party, comprising the steps of:

            establishing a link from said second alerting  
25 device to a service node connected to a host switch, said host switch providing a voice path between said calling party and said subscriber using said first call alerting device;

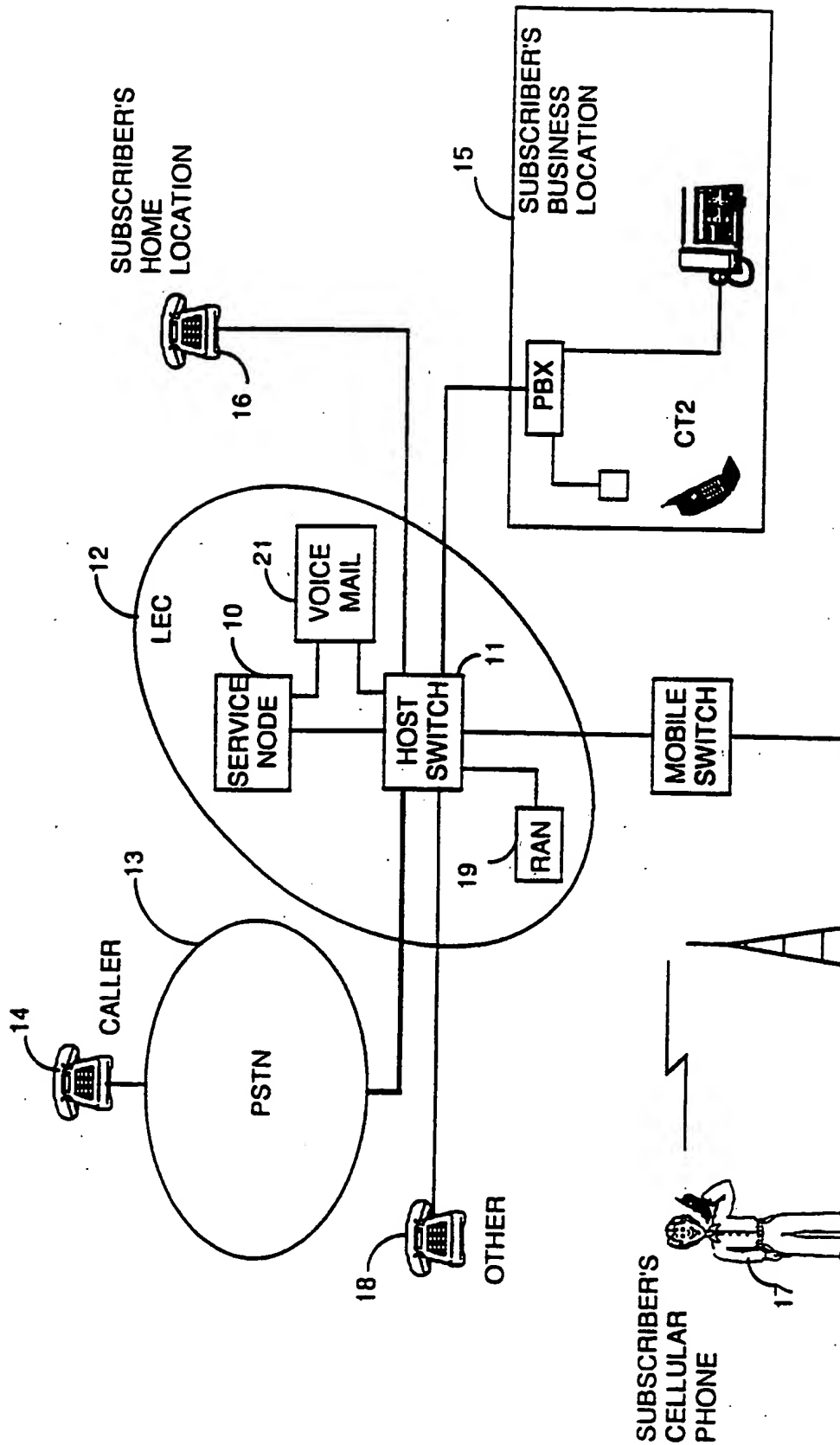
            sending a DTMF code from said second alerting  
30 device to said service node, said DTMF code corresponding to a request for a call in progress transfer;

            instructing said host switch to establish a conference bridge such that a second voice path is established between said second alerting device and said  
35 calling party; and

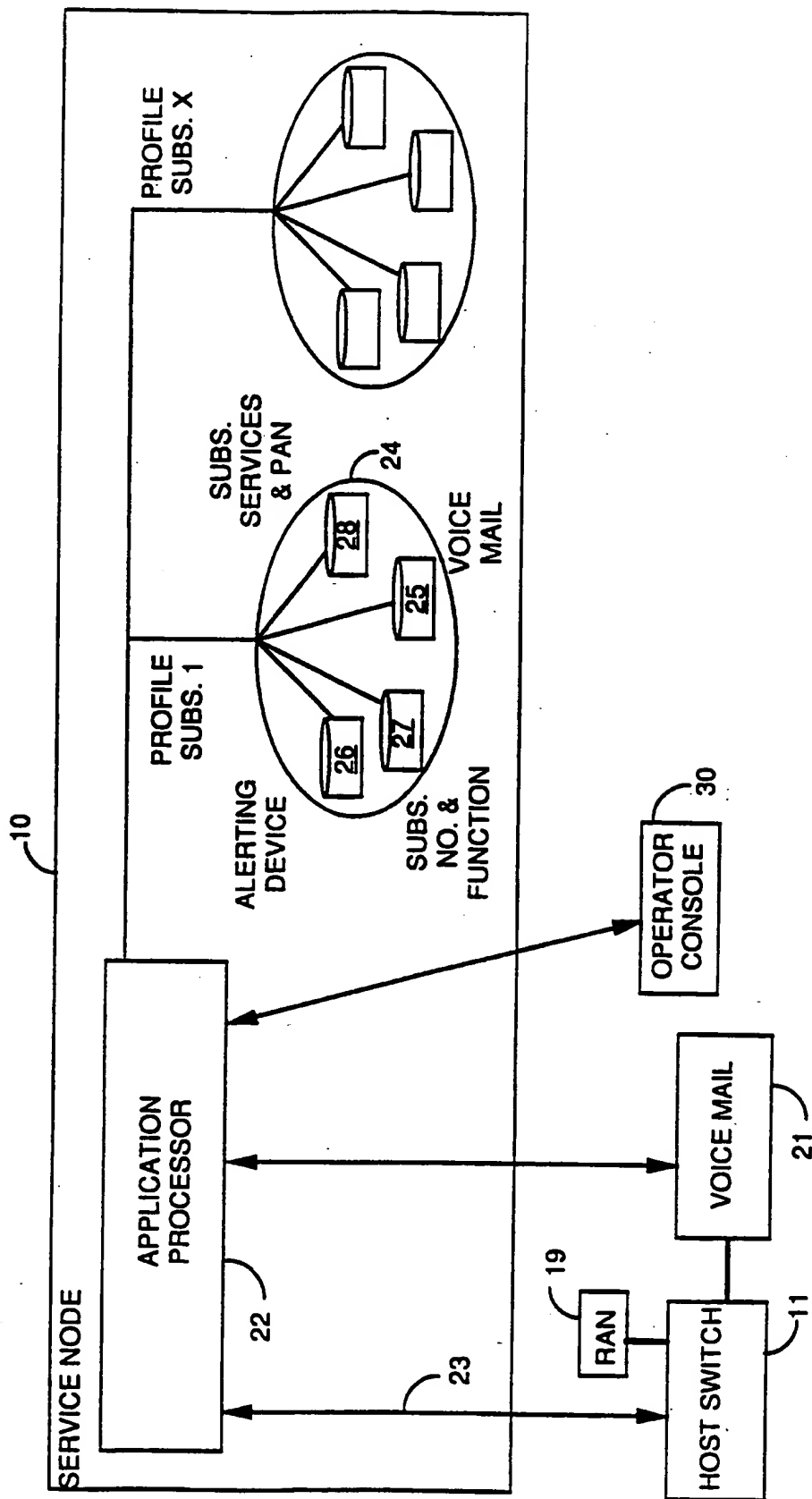
releasing said first voice path, such that said call can continue between said calling party and said subscriber on said second alerting device.



1/7

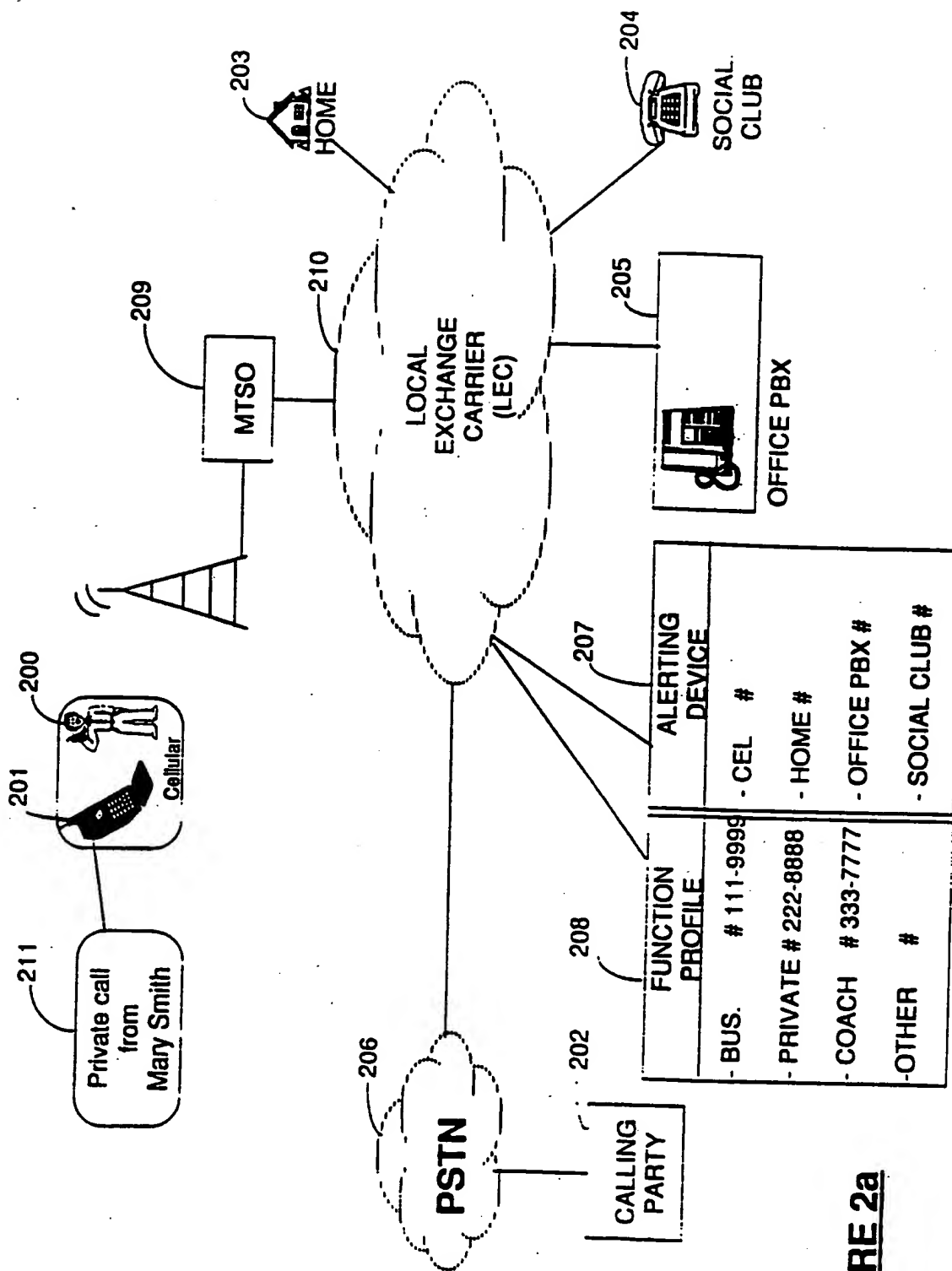


**FIGURE 1a**



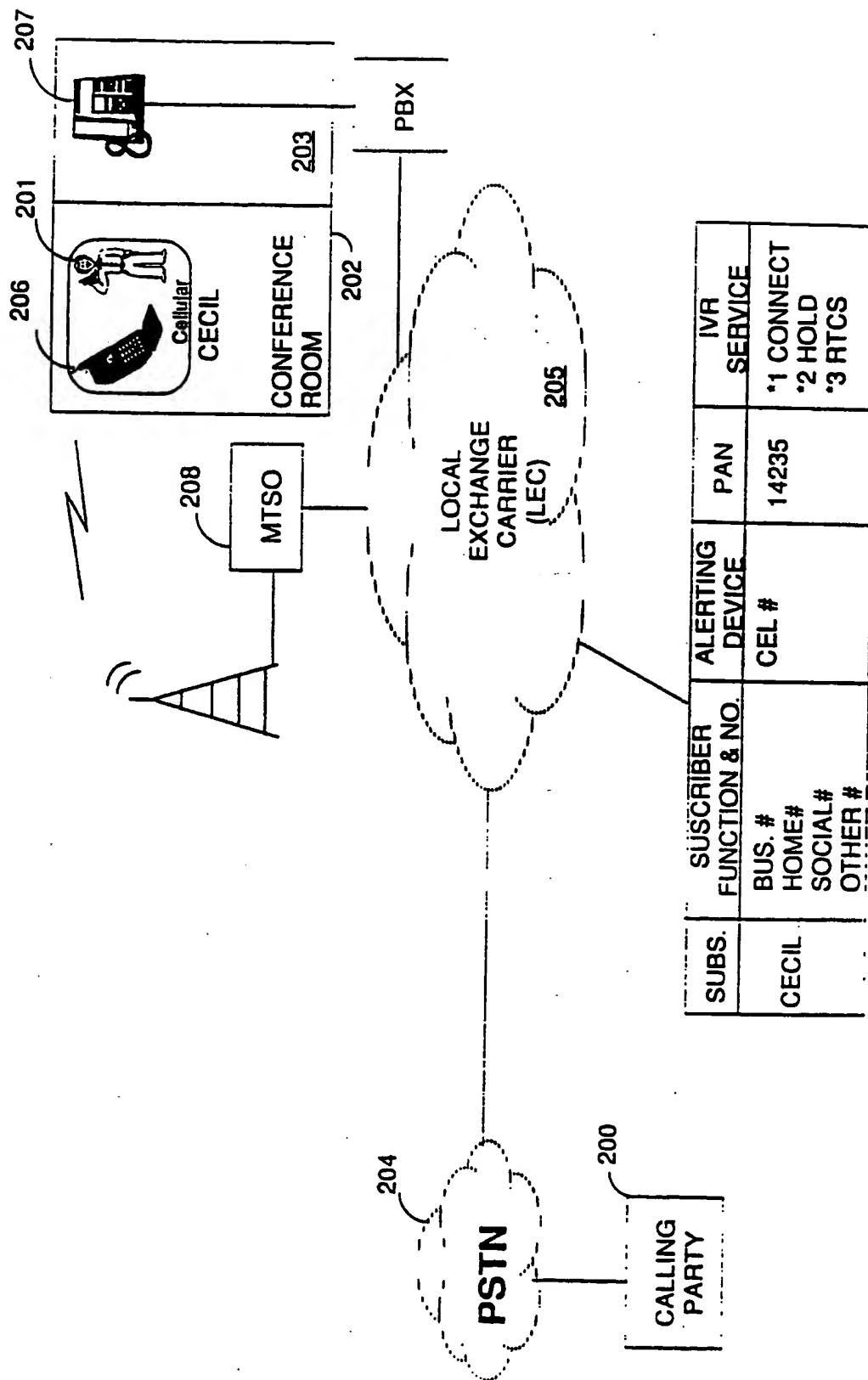
**FIGURE 1b**

3/7

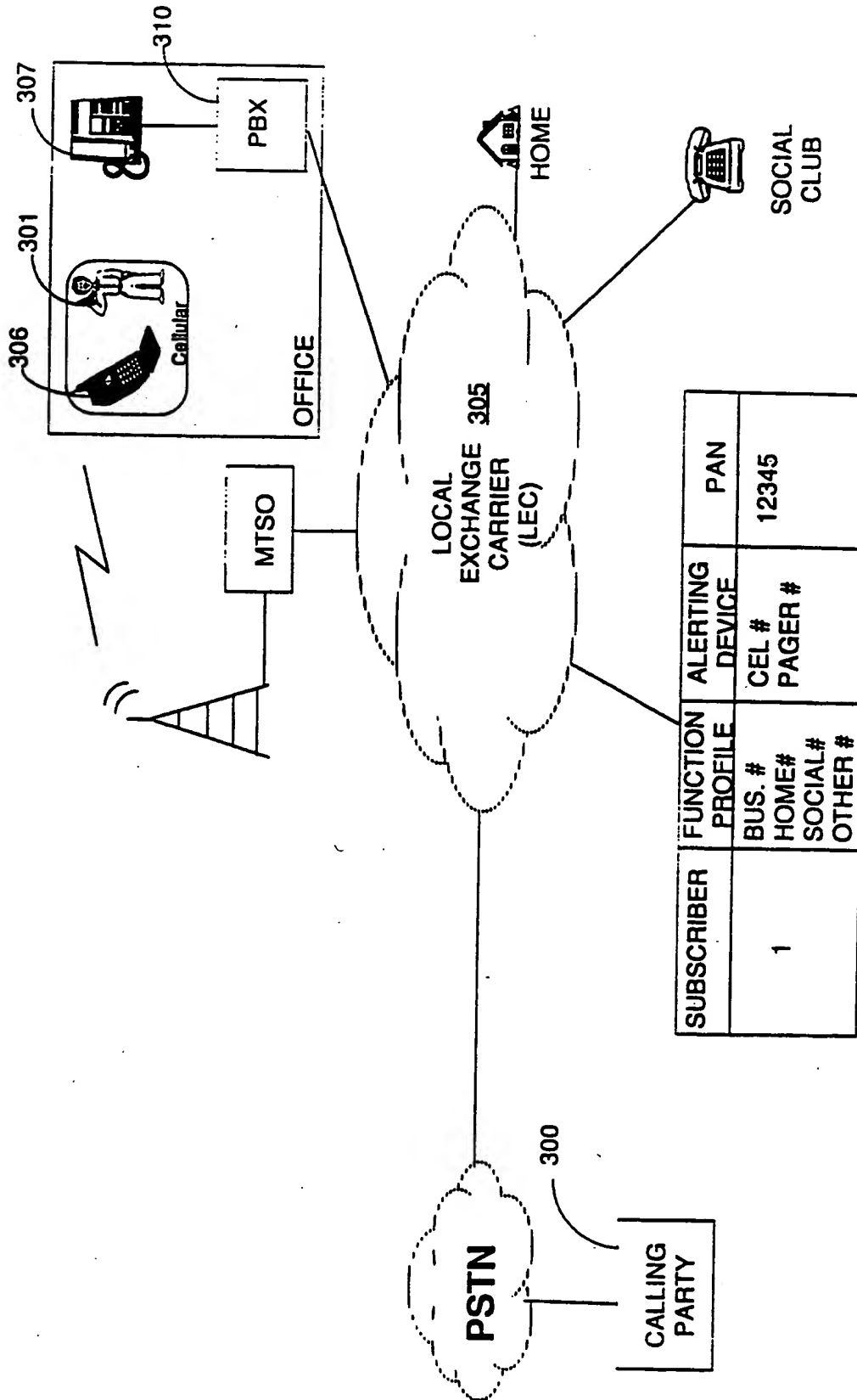


**FIGURE 2a**

4/7

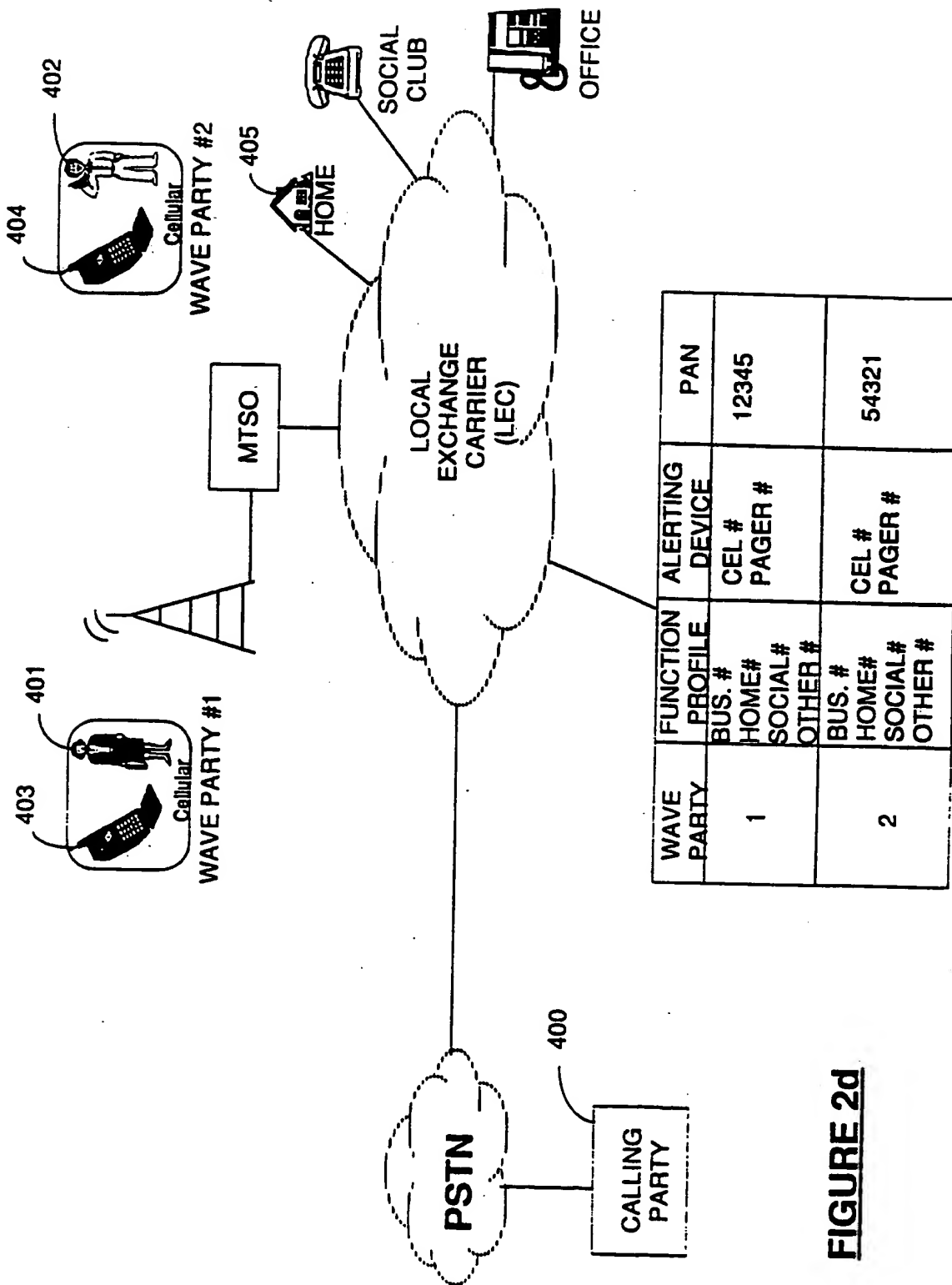


**FIGURE 2b**



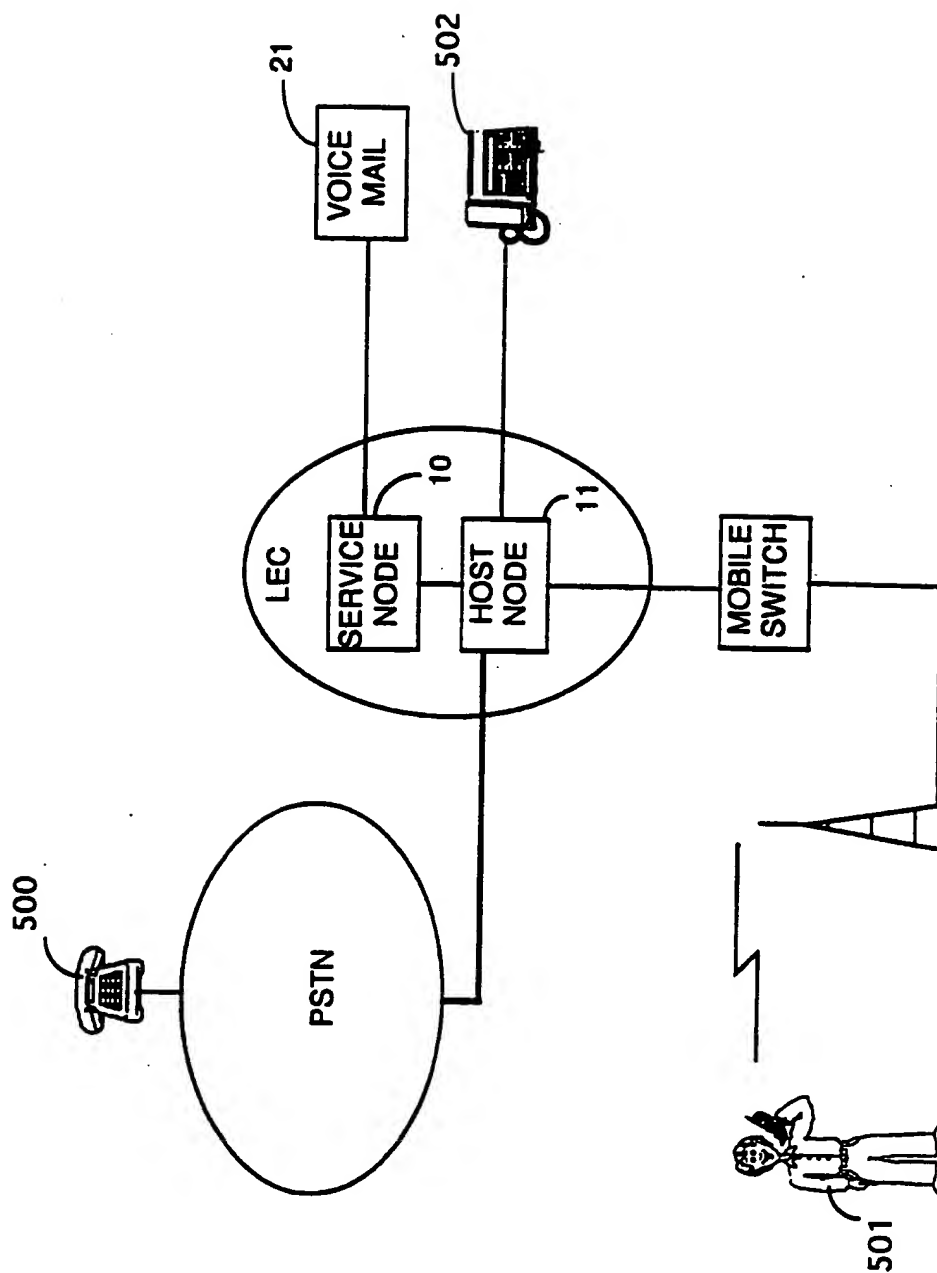
**FIGURE 2c**

6/7



**FIGURE 2d**

7/7



**FIGURE 2e**

## INTERNATIONAL SEARCH REPORT

Intern. Application No

PCT/CA 94/00258

A. CLASSIFICATION OF SUBJECT MATTER  
 IPC 5 H04M3/38 H04Q3/00

According to International Patent Classification (IPC) or to both national classification and IPC

## B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

IPC 5 H04M H04Q

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practical, search terms used)

## C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A	INTERNATIONAL SWITCHING SYMPOSIUM - PAPER B1.5, vol.1, 25 October 1992, YOKOHAMA (JP) pages 54 - 58, XP337616 L. RYDIN ET AL 'Network and service evolution in fixed and mobile networks' see paragraph 4.1 see paragraph 4.2	1,3-7, 9-11,13
A	IEEE GLOBAL TELECOMMUNICATIONS CONFERENCE & EXHIBITION - PAPER 806.4, vol.3, 2 December 1990, SAN DIEGO (US) pages 1645 - 1649, XP218851 C. HIRSCHMAN 'Voice Services concepts for intelligent networks' see page 1649, right column, line 4 - line 14	7-12
	--- -/--	

☒ Further documents are listed in the continuation of box C.

☒ Patent family members are listed in annex.

## \* Special categories of cited documents:

"A" document defining the general state of the art which is not considered to be of particular relevance

"E" earlier document but published on or after the international filing date

"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)

"O" document referring to an oral disclosure, use, exhibition or other means

"P" document published prior to the international filing date but later than the priority date claimed

"T" later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention

"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone

"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art.

"&" document member of the same patent family

Date of the actual completion of the international search

28 September 1994

Date of mailing of the international search report

07.10.94

Name and mailing address of the ISA

European Patent Office, P.B. 5818 Patentlaan 2  
 NL - 2280 HV Rijswijk  
 Tel. (+31-70) 340-2040, Tx. 31 651 epo nl,  
 Fax (+31-70) 340-3016

Authorized officer

De Muyt, H



## INTERNATIONAL SEARCH REPORT

Intern al Application No

PCT/CA 94/00258

## C.(Continuation) DOCUMENTS CONSIDERED TO BE RELEVANT

Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A	IEEE GLOBAL TELECOMMUNICATIONS CONFERENCE & EXHIBITION - PAPER 402B.5, vol.1, 2 December 1990, SAN DIEGO (US) pages 420 - 426, XP218765 J. REGNIER ET AL 'Personal Communication Services - The New POTS' see page 424, left column, line 25 - line 50 ---	1-11
E	US,A,5 329 578 (BRENNAN ET AL) 12 July 1994 cited in the application see the whole document ---	7-10
A	GB,A,2 240 693 (BRITISH TELECOMMUNICATIONS PLC) 7 August 1991 see page 4, line 27 - page 7, line 35 ---	7-11
A	WO,A,91 09483 (THE TELEPHONE CONNECTION) 27 June 1991 see page 6, line 1 - line 19 ---	7-11
A	IEEE INTERNATIONAL CONFERENCE ON COMMUNICATIONS - PAPER 1.6, vol.1, 22 June 1986, TORONTO (CA) pages 28 - 32 A. FRIEDES ET AL 'ISDN Opportunities for large business - 800 service customers' see page 30, paragraph 4.1 ---	1-11
A	US,A,5 206 901 (J. HARLOW ET AL) 27 April 1993 see column 2, line 9 - column 3, line 5 ---	7,12
X,P	ERICSSON REVIEW, vol.70, no.4, 1993, STOCKHOLM (SE) pages 140 - 155, XP406698 J. SUNDBORG 'Universal Personal Telecommunication (UPT) - Concept and Standardisation' see page 149, left column, line 13 - right column, line 26 -----	13

# INTERNATIONAL SEARCH REPORT

Information on patent family members

Intern. Application No

PCT/CA 94/00258

Patent document cited in search report	Publication date	Patent family member(s)	Publication date
US-A-5329578	12-07-94	NONE	
GB-A-2240693	07-08-91	NONE	
WO-A-9109483	27-06-91	US-A- 5058152 AU-A- 7156891	15-10-91 18-07-91
US-A-5206901	27-04-93	CA-A- 2078598 EP-A- 0549126	24-06-93 30-06-93